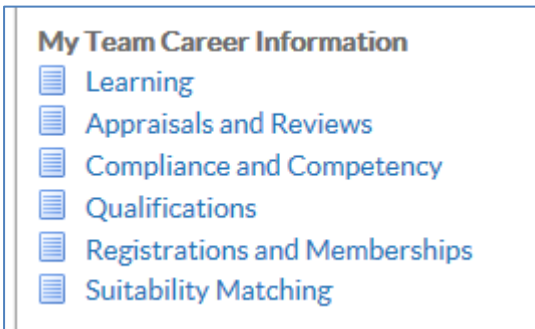
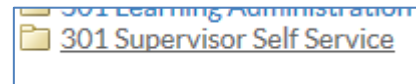


Quick Guide to Recording Appraisals on ESR

After the annual PDC conversation has taken place you are required to record the appraisal date and the PDC Outcome on ESR. You must retain the full PDC paperwork on the staff member's file.

Access ESR and choose the role **301 Supervisor Self Service**

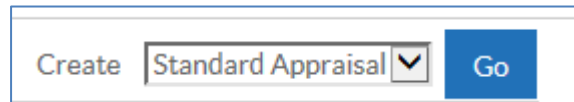


From the menu that appears select **Appraisals and Reviews**.

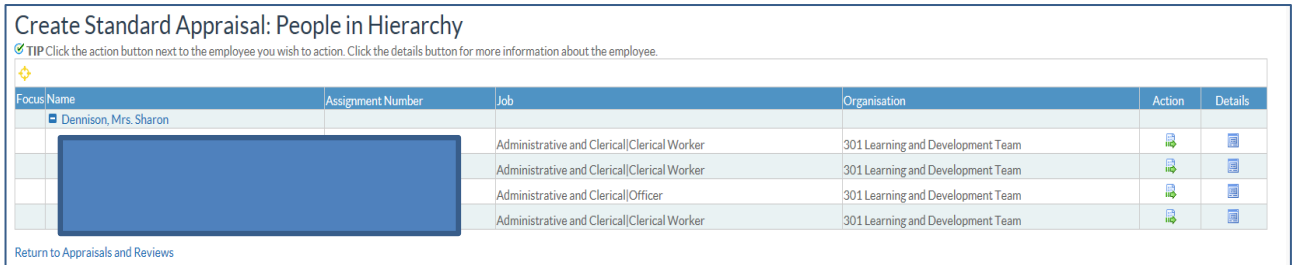
You will then be taken to the Appraisals and Reviews screen



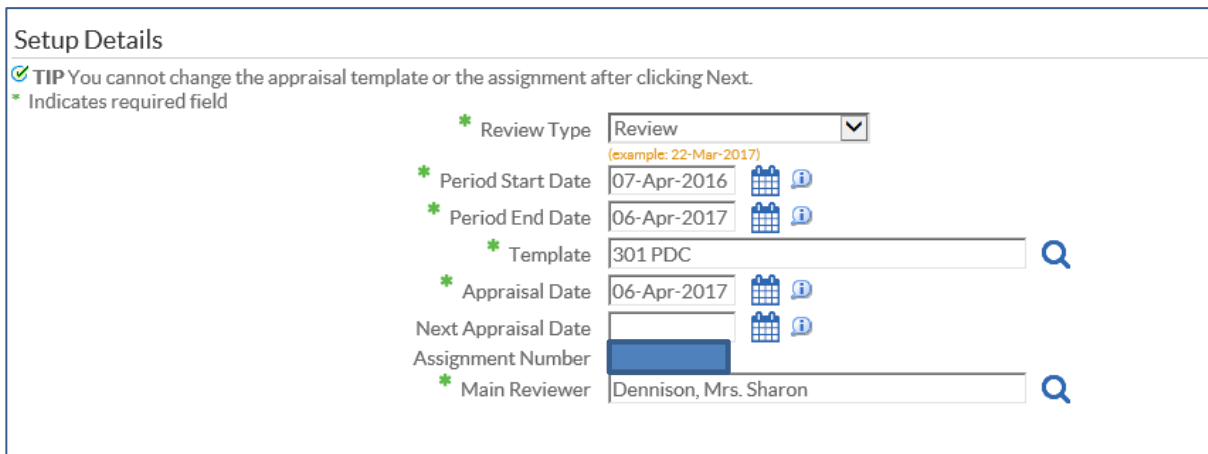
Click on the **Go** Button next to **Create Standard Appraisal**



You will then see a list of the staff in your hierarchy. Click on the **Action** Button next to the relevant person



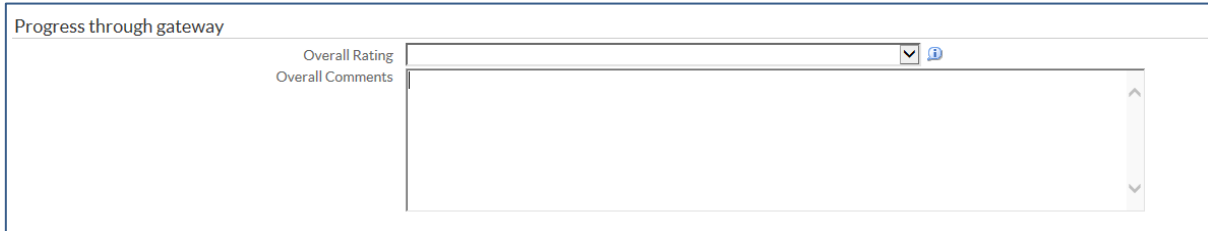
You will then be taken to the Setup Details Screen where you enter the relevant dates. In **Review Type** choose **Review** and in **Template** type enter **301 PDC**



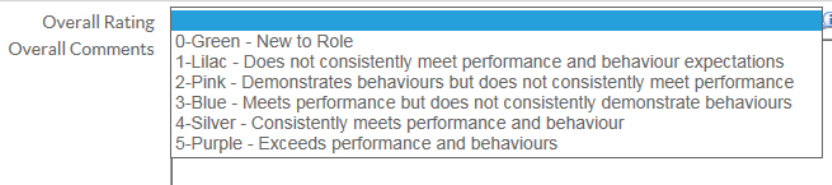
Once you have entered the Setup information Click on **Add Details**

Add Details

You will then be taken to the next screen where you can record the PDC Outcome



The drop down box for Overall Rating is mapped to the colour coded outcomes from the Maximising Performance Matrix. Record this outcome and your comments to support this outcome in the relevant boxes.



Once you have chosen the outcome click on **Save and Proceed**

Save and Proceed

On the next screen click on **Complete Appraisal**

Complete Appraisal

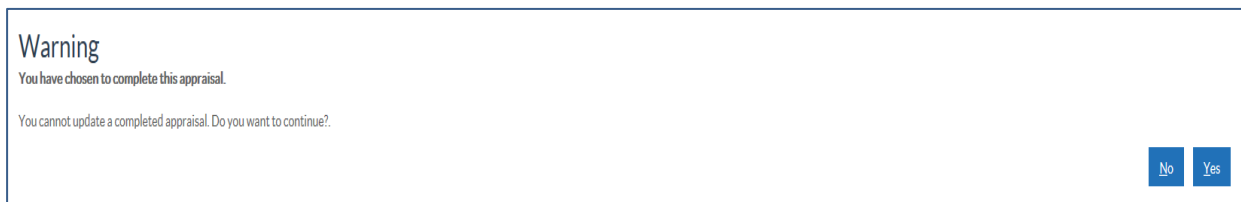
On the next screen click on **Continue**

Continue

On the next screen click on **Submit**

Submit

Finally you will reach the screen which warns you that you will not be able to update/change the appraisal if you Click on Yes. To record the appraisal as completed click on **Yes**



The appraisal will now be recorded under the Completed Appraisals Section in your Appraisals and Reviews area in Supervisor self service. **If you have any queries on using this guide – please contact course.bookings@sssft.nhs.uk**

Full support and guidance on undertaking PDC/Appraisals can be found here:

[PDC - Planning and Preparation](#)